

CASE STUDY: THE LONG AND WINDING (AND WINNING) ROAD

In February 2007 clients of ours realized they would have a mess on their hands if a wealthy gadfly was able to pass a measure to limit construction in June 2008. They commissioned CERC to execute a **long-term research plan**. An **initial survey** clearly showed that the measure was popular and likely - at that point -- to win with more than 60% of the vote. Further, the opposition messages we tested did not resonate and a low turnout, which was likely, would help the measure. At that point the client could have mothballed the research effort and scuttled the campaign, but **starting early** gave our clients the luxury of time. At eight months out, we scheduled a series of **four focus groups**. Two groups is the norm for smaller campaigns, but we knew from our survey research that understanding the pressure points and developing winning messages were going to take more effort. The additional groups proved fortuitous. After making precious little headway with three groups, our moderator - the stellar **Paul Fallon** - suggested we run the discussion in reverse order and put the emphasis on the wealthy gadfly instead of running through our raft of messages as we had been doing. This tactic opened our eyes to the potential of personalizing the measure. We tested our retooled and sharpened messages in a **second benchmark** five months before the election. Although the electorate was in the same place it had been a year earlier, we now had bullets in our gun and a workable plan. The campaign set in motion. We ran a **brushfire survey** one month out which showed we were gaining traction, though the outcome would be close. Despite a low turnout, the measure was narrowly defeated.

Lesson: If at first you don't succeed, try and try again . . . with more effort.

Summer 2009

... We're Listening

We asked some readers of *The Edge* what they'd like to see in the newsletter. Well, OK, you know CERC: we conducted a random survey of 100 folks on our newsletter distribution list. First, we learned that a substantial number don't actually get the newsletter for one reason or another. So we took the opportunity to update our files. We also learned that almost all recipients do read most or the entire newsletter (which is gratifying, of course). But some readers also told us they want more "hands-on" material about how we do our jobs and case studies to help them better understand how to use power of Competitive Edge.

So, being good consumers of research data ourselves, we've included an article penned by Research Analyst Liz Sheld which delves into some of the details of how a well-crafted questionnaire is designed. She talks about randomization and split samples which, when employed correctly, are two of our "power tools."

We're also replacing the "Client Feedback" feature with a brief case study. Although we have included client comments in every issue of *The Edge* dating to 1994, we think the space will be put to better use by including a snippet about a real life story. Above we show how extensive research was used to turn a "sure thing" into a loser.

We hope you all like the changes. If not, don't wait for us to call again.

2009 AAPOR Conference Report

CERC President John Nienstedt presented his findings on interviewer effects at a conference session on Friday, May 15th. “It was an interesting experience,” Nienstedt said. “Two of the field’s luminaries – Gary Langer of ABC News and Tom Guterbock of the University of Virginia – were in the audience and I quoted both of them in my presentation. That’s a little bit of pressure.” The presentation was well-received.

The paper shows that the race of an interviewer only trivially influenced results for presidential trial heat questions and questions related to impressions of Obama, but that race-of-interviewer effects were less than slight among Democrats, early in the campaign, among older voters and among women. The paper also presents clear evidence that interviewer bias related to the candidates did not affect the survey results.

John had this story for us. “I saw Gary Langer before the conference in the lobby and told him what I’d be presenting. He furrowed his brow and replied that he hadn’t found any interviewer effects when looking at his presidential trial heat results. I suggested that he take another look at his data on impressions of Obama because that’s where we found stronger race-of-interviewer effects. He was skeptical, but he e-mailed me after the conference with the news: ‘Hot damn, we get the same thing.’ Nice ending!”

Other nuggets coming out of this year’s conference:

Are All Polls becoming Equally Accurate? Internet surveys are more deviant from actual electoral results than all other forms of polling.

Are Political “Markets” Superior to Polls in Predicting Outcomes? No. Polls beat the market 55% of the time and 67% of the time when 7-day rolling averages are used. Authors believe political markets have become more accurate because traders are using polls to make buy/sell decisions, but polls still out-perform markets.

Are Text Message Surveys the Wave of the Future? Attendees could take part in a cool 3-question survey, but there are clear limitations to leveraging the technology.

Is the Cell Phone-Only Population Hampering Survey Accuracy? Multiple papers suggest political surveys which are conducted using only landlines are just as accurate as those which include the cell phone-only population. Applying proper weights – which CERC does – ensures that deviation between the two methods is only 1% or less. **F**

What’s that doing in my survey?

By Research Analyst Liz Sheld



We spend a good deal of time crafting the perfect questionnaire to achieve the appropriate research objective. Clients often ask about some of the elements included in the survey CERC has designed for them. Here are a few things that you will probably notice in any questionnaire that CERC designs for you and the reasons why we have included them.

“RANDOMIZATION” It’s common knowledge that, for an opinion survey to be valid, it must be conducted among a randomly selected group of people. But the benefits of randomization can also be leveraged within the survey questionnaire itself.

We know that questions posed early in a survey can bias those that come afterwards. When we randomize questions, or

groups of questions (known as “batteries”), we eliminate the possibility of bias showing up in the aggregate results. Although individual responses may be affected by question order, by randomizing the order of the questions, the overall effect of that will be nil.

Within questions, we want to eliminate possible “primacy effects” (where a respondent is biased towards the first choice they are offered) along with possible “recency effects” (where the respondent is biased towards the most recent choice they hear). By the way, it has been demonstrated that primacy effects are stronger when the respondent is dealing with a paper questionnaire (such as a ballot) and recency effects are stronger when the respondent is being interviewed (such as in a phone survey). Once again, by randomizing the order in which the response choices are heard, we eliminate the bias that might otherwise affect the results of our research.

“SPLIT” Sometimes you will see that we have two different versions of the same question, which means we are “splitting” the sample. We will split the sample when we are looking for precise differences in how a candidate, issue or message is presented. Are voters more likely to support your candidate when he is labeled as a “lawyer” or when he is labeled as a “Senator” or when he is labeled as a “community organizer?” When we split the sample we randomly assign respondents to hearing one of two or more “treatments.” In this way we can accurately determine whether there is a real difference between the labels (or versions of a ballot statement, etc.) and get an accurate read on the size of the difference. Splitting the sample leads to determining the true impact wording or framing can have on your campaign and ultimately results in better communication with your target market.

Sound survey design is crucial for quality research. Next time you review one of CERC’s expertly designed questionnaires you’ll know how these elements ensure the collection of the most accurate data. And that gives you the competitive edge. **F**

On CERC’s Nightstand . . .

Outliers, by Malcolm Gladwell

Coming on the heels of social science blockbusters *Tipping Point* and *Blink*, perhaps expectations for *Outliers* were set too high. But the third book in the trilogy comes off as a collection of snappy anecdotes without a compelling endpoint. Along the way the book makes some good points: some people get very lucky breaks; it takes a lot of hard work – 10,000 hours -- to master a discipline; culture can determine outcomes (see the frightening discussion on plane crashes); IQ isn’t as big a deal as EQ (emotional intelligence). But the book’s theme is muddy. After all, an outlier in social science is usually not a good thing; it gets removed from the dataset. And this lack of a tightly reasoned hypothesis contributes to *Outliers*’ shortcomings. Key quote: “[Public] schools **work**. The only problem, for the kids who aren’t achieving, is that there isn’t enough of it.”

Manias, Panics and Crashes; a History of Financial Crises, by Charles Kindleberger and Robert Aliber

Nobel laureate Paul Samuelson writes on the book cover “Sometime in the next five years you may kick yourself for not reading and re-reading” this book. Nail, head, smack! It’s long and repeats itself partly because the crises (dating back to the Dutch tulip mania of the 1600s) Kindleberger dissects are remarkably similar. But this economist is funny at times. Key quote regarding governments acting as lenders of last resort: “This is a neat trick: always come to the rescue, in order to prevent needless deflation, but always leave it uncertain whether

rescue will arrive in time or at all, so as to instill caution in other speculators, banks, cities or countries.” **F**